

## **University-Wide Process for the Creation or Revision of Unit/College Policies for the Availability and Use of Professional Development Funds**

### **Purpose**

Article 24, Section 5.1 of the Collective Bargaining Agreement charged the Labor-Management Committee (LMC) with reviewing current practices and developing recommendations for awarding faculty professional development funding with a goal of improving consistency within colleges and ensuring equitable access and support for all faculty.

The LMC surveyed deans about their funding practices, discussed with them their concerns and suggestions about possible changes, and met with the provost about his philosophy and experiences surrounding professional development guidelines.

The LMC recommends the following guidelines for unit/college processes for creating policy to award professional development funds to bargaining unit faculty members.

Unit faculty should work collaboratively with chair/director and dean to create a policy document to guide the availability and use of professional development funds provided by BGSU.

The document should address:

#### **1. Equity among BUFMs and Relationship to Merit and Reappointment, Tenure, and Promotion Policies:**

- a. Recommendation: The LMC recommends that colleges affirm the equal importance of professional development for all faculty and that units make more intentional the relationship between professional development allocations and their merit and reappointment, tenure, and promotion expectations.
- b. Rationale: In many colleges, TTF are allocated twice as much funding for professional development as QRF. It is not clear the basis for this distinction since many professional development expenses are fixed costs (e.g., conference registration, travel, and lodging) and professional development is essential because "BUFMs shall maintain their scholarly competence" (CBA Article 9, Section 2.4).

#### **2. Level of Funding:**

- a. Recommendation: The LMC recommends that each BUFM is provided a minimum of \$1,000 annually for professional development.
- b. Rationale: With good tracking and analysis, the goal is that units will be able to cover the standard allocations as it is likely some BUFMs will not utilize their full allocation each year.

#### **3. Carry forward:**

- a. Recommendation: The LMC recommends that balances be able to carry forward to the following year, with stated limits on the amount and/or length of time. Unit policies will detail the procedures for remaining professional development balances to carry from one year to the next (e.g., capped at a dollar amount, plan for spending [e.g., saving for international conference]).
  - i. Unused funds could be added to a pool to which unit faculty could apply for additional funding.
  - ii. Different sources of funds may be handled differently (e.g., standard unit allocation swept each year vs. award or learning community stipends that carry forward).
  - iii. The LMC is not recommending an individual account for each faculty member but is recommending that each unit develop an internal system to track allocations and expenditures for each faculty member.
- b. Rationale: A variety of situations may prevent faculty members from using their full allocation in a given year, but they may be able to use those funds effectively the following year. Additionally, given the expense of some professional development opportunities, it may be necessary to accumulate funds over a couple of years to cover costs without having to supplement excessively with personal funds.

#### **4. Notification of Professional Development Allocation:**

- a. Recommendation: The LMC recommends that faculty be informed of their annual allocation, including any PD balance (if available) from the prior year, by September 1.
    - i. In addition to the unit allocation, this notification should include remaining funds from other sources (e.g., professional development stipend awarded for participation in special program).
    - ii. Units should develop a process through which faculty can check their running balance of funds throughout the year.
  - b. Rationale: Faculty are often uncertain about funds available to them for the year or funds they have remaining throughout the year.
5. **Allowable expenses:**
- a. Recommendation: Unit policies should not be unduly restrictive. Allowable expenses in departmental policies will not be more restrictive than university procurement and travel policies and must fall within any other applicable university policies and Ohio ethics law. Departmental policies must contain the process for pre-approval of expenses.
  - b. Rationale: To best support their professional development, faculty should have reasonable flexibility in making decisions.
6. **Expense Reimbursement Procedures:**
- a. Recommendation: Units should follow standard university protocols for reimbursement of travel expenses, with as few additional restrictions as possible.
    - i. For example, once travel is pre-approved, faculty should be permitted to purchase air travel using the department P-card. There should not be limits on the number of times a BUFGM can submit expenses for reimbursement in an academic year if they are within their professional development allocation.
    - ii. See University Travel Expense Policy 3341-6-47 [University Travel Expenses Policy \(bgsu.edu\)](http://bgsu.edu)
  - b. Rationale: This approach give faculty members maximum support to use their allocations to support their professional development and helps them avoid the burden of carrying professional development expenses in their personal budgets for excessive time periods.
7. **Appeals:**
- a. Appeals regarding professional development funding should be made first to the chair/director and then to the dean.
  - b. There are no appeals beyond the dean.

**Action Deadline:**

- Documents developed and approved by chair/director/dean – May 25, 2022

March 22, 2022